



USDA Foreign Agricultural Service

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## Netherlands

### Fishery Products

### Annual

### 2003

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**Report Highlights:**

Consumption of canned salmon remains stable in the Netherlands, while consumption of fresh salmon continues to climb. It is expected that Dutch imports of canned salmon will remain low in 2004, as transshipments to other EU members hold steady at 2003 levels.

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Includes PSD Changes: No  
Includes Trade Matrix: No  
Unscheduled Report  
The Hague [NL1]  
[NL]

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**Executive Summary**

Salmon consumption in the Netherlands is rising thanks to increased purchases of fresh, farm-raised salmon. Meanwhile, consumption of canned salmon remains stable at just over four thousand metric tons per year.

The Netherlands's role as a transshipment point for canned salmon was diminished somewhat in 2003 as imports and onward shipments fell by more than one thousand metric tons.

## Production

Salmon supply is comprised of both farmed salmon and wild catch. The production of farmed salmon is dominated by Norway and Chile, and there is no salmon farming in the Netherlands. However, the biggest salmon producer in the world is the Dutch based Nutreco; operating in Norway, Chile, Canada, Ireland, Australia and the UK.

Most commercially traded wild salmon is caught in the Pacific: Alaska (USA) and British Columbia (Canada) and to a lesser extent Russia. There are no wild salmon caught in the Netherlands. The Netherlands is, however, a significant consumer of canned wild salmon. In the Netherlands the three leading trading companies in canned salmon are Princess, MCM and Heinz.

## PSD Canned Salmon

	2002	2003*	2004**
Beginning stock	82	180	100
Total production	0	0	0
Intra-EU imports	1,718	1,262	1,250
Other imports	4,414	3,497	3,750
Total imports	6,132	4,800	5,000
Total supply	6,214	4,939	5,100
Intra-EU exports	1,454	260	300
Other exports	17	40	30
Total exports	1,471	300	330
Domestic consumption	4,263	4,261	4,250
Other use/loss	300	278	250
Total utilization	4,563	4,539	4,500
Ending stock	180	100	270
Total distribution	6,214	4,939	5,100
ts=td	0	0	0

\* FAS Estimate

\*\* FAS Forecast

Source: World Trade Atlas

## Consumption

In the Netherlands, per capita consumption of all salmon is increasing. Consumption increases, though, are limited to fresh and added-value fish products. Post estimates that in 2002 the Dutch consumed 4.3 million kg of canned salmon, a level that has been stable for the last 5 years, and is expected to remain at a similar level in coming years.

## Trade

In 2002, the Netherlands imported 6.1 million kg canned salmon, 8 percent more than the previous year. The majority of the imported canned salmon is directly supplied by the US and Canada, although the market share of Asian countries is increasing.

The US remains, by far, the leading supplier of canned salmon with a market of over 40 percent in 2002. Approximately one-fourth of canned salmon imports are known to originate from other EU member states. Declarations of imports from other EU states, however, are voluntary, and it is likely that actual imports are higher.

The trade in canned salmon mainly takes place in the last three months of the calendar year.

<b>Import Matrix Canned Salmon</b>			
Metric Tons			
	<b>2001</b>	<b>2002</b>	<b>2003*</b>
United States	2,111	2,544	413
Canada	437	1,399	47
Russia	1,199	119	0
South Korea	128	234	13
Other Non EU	107	118	132
<b>Total Non EU Import</b>	<b>3,982</b>	<b>4,414</b>	<b>605</b>

Germany	1,005	848	237
Belgium	354	635	332
United Kingdom	78	208	0
Other EU	222	27	0
<b>Total EU Import</b>	<b>1,659</b>	<b>1,718</b>	<b>569</b>

<b>Total Imports</b>	<b>5,641</b>	<b>6,132</b>	<b>1,174</b>
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Source: World Trade Atlas

\* January-April 2003

<b>Export Matrix Canned Salmon</b>			
Metric Tons			
	<b>2001</b>	<b>2002</b>	<b>2003*</b>
Germany	97	1,239	4
United Kingdom	1,008	74	20
Belgium	192	96	36
Other EU	146	45	15
<b>Total EU Export</b>	<b>1,443</b>	<b>1,454</b>	<b>75</b>

<b>Total Non EU Export</b>	<b>51</b>	<b>17</b>	<b>6</b>
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Total Export	1,494	1,471	81
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Source: World Trade Atlas

\* January-April 2003

### Marketing

U.S. firms that wish to export seafood to the European market might consider the benefits of using the Netherlands as a starting point. The world's largest port, Rotterdam, is in the Netherlands. In addition, the Netherlands has a very efficient and highly developed distribution system. Almost 50 percent of U.S. food and agriculture exports to The Netherlands are re-exported to other EU countries, either directly or after further processing.

### Trade Shows

The main seafood Trade show for the European market is the European Seafood Exposition held every spring in Brussels, Belgium. At this show, USDA helps sponsor a pavilion where individual companies and organizations have their representation. Other leading trade shows in Europe with seafood representation are ANUGA in Germany and SIAL in France.